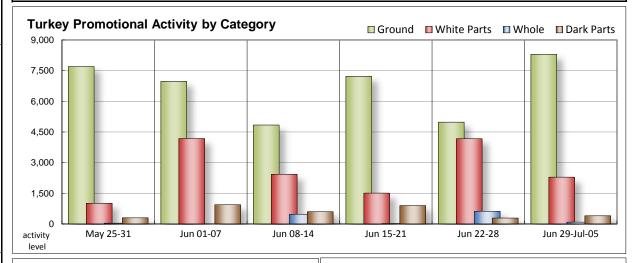


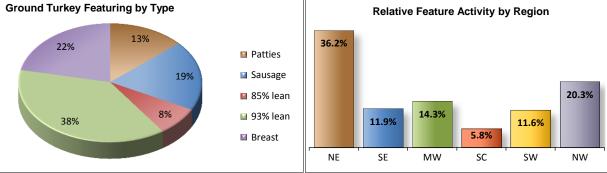
**Breast** 

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace) **NATIONAL SUMMARY** THIS WEEK LAST YEAR **LAST WEEK** 35.1% of 22,500 24.2% of 22,500 40.8% of 19,500 Feature Rate 1/ outlets outlets outlets Special Rate 4/ 2.2% 7.9% 0.8% Activity Index 2/ 13,960 12,640 13,160 Stores Wtd Avg Stores Wtd Avg Stores Wtd Avg WHOLE BIRDS: Fresh - Hens 10 1.59 30 1.48 80 1.55 - Toms 30 40 1.48 1.49 Frozen - Hens 1.34 280 30 1.11 - Toms 50 1.43 280 1.11 PARTS: Breast: Bone-in, whole Fresh 10 2.29 Frozen 2.01 340 610 1.80 520 1.73 Split. bone-in Fresh 260 3.00 210 2.99 10 2.99 Rotisserie 140 6.26 340 7.82 60 7.30 4.03 Boneless, whole 200 630 4.15 Cutlets 650 4.79 1,240 4.73 300 4.66 Cutlets, thin sliced 30 4.35 Strips 240 5.99 10 4.54 1.160 4.52 90 4.77 Tenders 430 4.05 4.28 Marinated Tenders 1.260 580 4.32 1.380 3.95 1.79 Drumsticks 90 1.49 100 1.36 200 Thighs 1.79 200 1.79 90 20 1.79 Wings 40 1.55 100 1.74 200 1.79 1.69 Necks 10 Smoked Drumsticks 80 2.47 30 1.82 40 2.39 **Smoked Wings** 40 2.19 20 1.79 40 2.39 50 1.89 1.79 Smoked Necks 20 40 1.59 **GROUND TURKEY:** 8,300 3.45 4,980 3.20 9,620 2.86 Patties 1.120 3.53 940 3.22 2.040 2.94 1,590 3.41 1.100 3.37 2.710 2.90 Sausage 85% lean 640 2.42 870 2.33 2,010 2.36 93% lean 3.150 3.08 1.490 3.04 2.290 2.82 1,800 4.58 580 4.52 570 4.15 Breast Rolls (frsh/frz 1 lb.) 160 2.35 460 1.42 40 1.49 Specialty 5/ **Patties** 650 3.58 140 4.48 10 4.99 93-94% lean 610 3.56 590 4.00 20 3.00

This Week's Turkey Feature Highlights

Feature activity increases heading into the holiday week and Fourth of July celebrations. Fewer stores promote fresh and frozen whole turkeys and instead increase offerings on frozen bone-in breasts. Offerings are less active on boneless white parts and prices are mostly lower. Promotional activity is most active on marinated tenders, providing a tasty selection for the grill. Dark parts are fully represented in the circulars this week; prices trend higher on smoked parts, mixed on fresh parts. Ground turkey offerings are where the action is, time to fire up the grill and enjoy a turkey burger or turkey sausage! Feature activity increases on all grinds except the 85% lean; advertised prices are higher on all ground items. Feature activity is less active on deli items. Offerings increase on service deli, especially on processor brands. Prices are lower on thick slicing and thin slicing meat, mixed on the other items. Self-service deli offerings decline; prices trend higher on 7-10 oz. packages, lower on 16 oz. packages. With all the hot weather cold cuts could be the best option this week to try and beat the heat.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

6.22

810

5.48

230

5.99

Note: rolls & specialty not included in ground turkey total and weighted average

200



## USDA Weekly Retail Turkey Feature Activity

Fri. Jun 29, 2012

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/29 thru 07/05.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORT	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  25.8% of 4,000 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 2,160				
	(CT,DE,MA,MD,N	ME,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	′V)					
Feature Rate 1/	65.6% of 4,4	00 sampled outle	ts	31.8% of 6,0	00 sampled outle	ts					
Special Rate 4/	4.1% of stores w	v/ no-price promo	tions	0.0% of stores	w/ no-price promo	tions					
Activity Index 2/	Activity	Index = 6,020		Activity	/ Index = 2,710						
-	Price Range	Summar	у	Price Range	Summar	У	Price Range	Summa	Summary		
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores \	Ntd Avg		
WHOLE BIRDS:											
Fresh - Hens	1.59	10	1.59								
" - Toms	1.00		1.00								
Frozen - Hens	1.37	20	1.37				0.99 - 1.69	10	1.28		
" - Toms							0.99 - 1.69	10	1.28		
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.97	20	1.97	1.97	190	1.97	1.28 - 2.29	350	2.04		
Split, bone-in											
Fresh	2.99 - 3.29	260	3.00								
Rotisserie	5.99 - 6.89	140	6.26								
Boneless, whole	3.99 - 4.97	160	4.04	3.99	40	3.99					
Cutlets	3.99 - 5.59	570	4.79	3.99 - 5.99	60	4.64					
Cutlets, thin sliced			-								
Strips											
Tenders	3.91	20	3.91	3.99	40	3.99					
Marinated Tenders	3.99 - 4.79	1,070	4.32	4.26	70	4.26					
Drumsticks	1.39 - 1.99	60	1.54			0	1.29	10	1.29		
Thighs							1.79	90	1.79		
Wings	1.99	10	1.99				1.29	10	1.29		
Necks									•		
Smoked Drumsticks				2.19	40	2.19	2.99	30	2.99		
Smoked Wings				2.19	40	2.19					
Smoked Necks				1.79 - 2.29	50	1.89					
GROUND TURKEY:											
Patties	2.50 - 3.99	220	3.78	2.50 - 3.00	240	2.60	3.48 - 3.99	320	3.78		
Sausage	2.79 - 3.99	550	3.41	3.50 - 3.99	200	3.97	2.79 - 4.49	550	3.31		
85% lean	1.99 - 3.07	150	2.66	2.00 - 2.67	190	2.30	2.33 - 2.66	50	2.50		
93% lean	2.99 - 3.64	220	3.16	2.40 - 2.99	1,250	2.98	2.80 - 3.67	540	3.17		
Breast (99-100% lean)	3.84 - 5.38	1,260	4.74	3.84 - 4.99	120	4.36	4.47 - 4.99	100	4.53		
Rolls (frsh/frz 1 lb.)							1.98 - 2.50	90	2.41		
Specialty <sup>5/</sup>											
Patties	3.50 - 5.49	580	3.59	3.50	70	3.50					
93-94% lean	3.50 - 4.99	540	3.57	3.50	70	3.50					
Breast	5.99	160	5.99	5.99	40	5.99					





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH C	ENTRAL U.S.		SOUT	HWEST U.S.	NOR	THWEST U.S.				
	(AR,AZ,CO,KS,L	A,MO,NM,OK,T	X,UT)	(C	A,HI,NV)	(AK,ID,MT,OR,WA,WY)					
Feature Rate 1/	18.3% of 4,00	0 sampled outl	ets	25.7% of 2,9	00 sampled outle	49.9% of 1,200 sampled outlets					
Special Rate 4/	0.0% of stores w	•		•	v/ no-price promo	0.0% of stores w/ no-price promotions					
Activity Index <sup>2/</sup>		Index = 880			Index = 1,270	Activity Index = 920 Price Range Summary					
Activity mack	Price Range	Summa	arv	Price Range	Summar						
	(\$/pound)		Wtd Avg	(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg			
VHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens											
" - Toms	1.47	40	1.47								
PARTS:		1									
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.79	10	1.79				1.98	40	1.98		
Split, bone-in											
Fresh											
Rotisserie											
Boneless, whole											
Cutlets	5.17	20	5.17								
Cutlets, thin sliced	<b></b>		0								
Strips											
Tenders	4.28 - 4.55	60	4.42				3.99	310	3.99		
Marinated Tenders	3.73 - 3.99	100	3.93				3.99	20	3.99		
Drumsticks	1.19 - 1.69	20	1.45				0.00	20	0.00		
Thighs	1.15 - 1.05	20	1.40								
Wings	1.19 - 1.69	20	1.45								
Necks	1.19 - 1.69	10	1.69								
Smoked Drumsticks	1.99	10	1.09								
Smoked Wings	1.33	10	1.33								
Smoked Necks											
ROUND TURKEY:											
Patties	3.29	50	3.29	3.50 - 3.99	260	3.96	3.28 - 3.29	30	3.28		
Sausage	2.87	30	2.87	2.87 - 3.27	260	3.25	5.25 0.20		0.20		
85% lean	2.39 - 2.49	40	2.43	2.33 - 2.50	200	2.34	2.29	10	2.29		
93% lean	2.40 - 3.59	440	2.99	2.80 - 3.75	500	3.12	3.19 - 3.99	200	3.47		
Breast (99-100% lean)	2 0.00			4.99	10	4.99	3.99	310	3.99		
Rolls (frsh/frz 1 lb.)	1.98	30	1.98	2.50	40	2.50	0.00	3.0	0.00		
Specialty 5/		1			1.2						
Patties											
93-94% lean											
Breast											



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jun 29, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/29 thru 07/05.

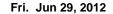
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

NATIONAL			SUMMAR	RY					SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			A,RI,VT)	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
73.6% of 22,50			73.6% of 22,500 73.3% of 22,500		81.1% of 19,500		•			ŕ				
Feature Rate 1/	stores		stores		stores		88.3%	tlets	75.1% of 6,000 sampled outlets					
Activity Index 2/	46,890		48,220		49,240		A			Activity Ind	ex = 10,610			
Activity index 2/	40,090		40,	220	49,	240	Price Ra	nge	Summary		Price Range Summary		ary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound) Stores		Wtd Avg	(\$/poui	nd)	Stores	Wtd Avg	
SERVICE DELI - Turkey														
Category 1														
Processor Brand	8,230	7.80	,	7.85	5,610	7.88	5.49 - 9		3,010	7.79	5.99 -	8.99	4,000	7.95
Private Brand	3,640	7.62	1,860	7.87	4,420	7.41	6.99 - 8	.99	3,110	7.72		6.99	10	6.99
Category 2														
Processor Brand	4,210	5.65	3,910	6.08	6,600	5.74	4.99 - 7		540	5.52	4.48 -		420	4.93
Private Brand	3,370	6.47	5,370	6.69	3,390	6.33	4.99 - 6	5.99	630	5.53	4.99 -	6.99	450	5.53
Category 3														
Processor Brand	820	3.96	1,030	4.11	1,190	4.41		.99	560	4.11		3.99	60	3.99
Private Brand	1,560	5.72	180	4.88	220	5.44	4.98 - 5	5.99	130	5.66		5.99	40	5.99
Turkey Ham														
Processor Brand	270	2.62	510	3.74	230	4.35	3.69 - 4	.49	50	4.01				
Private Brand			40	3.98										
Turkey Pastrami														
Processor Brand	80	4.49	440	3.88	280	4.41	3.99 - 4	.99	70	4.63				
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	2,540	6.99	6,420	7.52	3,590	7.47	5.99 - 8	.99	610	7.64	5.99 -	9.99	760	7.30
Private Brand	2,470	7.18	1,550	7.13	3,070	7.33	6.99 - 7	.99	1,080	7.21	5.99 -	6.99	270	6.44
Category 2														
Processor Brand	50	5.30	710	6.73	610	6.33	4	.99	10	4.99				
Private Brand	330	5.98	390	5.48	1,600	5.24								
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	8,090	3.25	8,270	3.05	8,740	3.34	2.88 - 3	.99	1,890	3.30	2.50 -	3.99	1,770	3.09
Private Brand	1,470	2.98	3,140	2.77	840	3.35	2.48 - 3	.00	300	2.90		3.00	510	3.00
Turkey 16 oz														
Processor Brand	270	4.37	510	5.09	60	5.66	3.99 - 6	.99	160	4.20		3.99	40	3.99
Private Brand	160	4.99	200	5.00										
Chicken 7-10 oz														
Processor Brand	7,900	3.26	6,920	3.09	8,040	3.36	2.88 - 3	.99	1,830	3.30	2.50 -	3.99	1,770	3.09
Private Brand	1,430	2.99	2,940	2.79	750	3.44	2.48 - 3	5.00	260	2.97		3.00	510	3.00

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/29 thru 07/05.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWI	EST U.S.		SOUTH CE	ENTRAL U	I.S.	SOUTH	WEST U.S.		NORTHWEST U.S.				
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,S	D,WI)	(AR,AZ,CO,KS,LA	(AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/										73.8% of 1,200 sampled outlets				
- Teature Nate	68.9% of 4,000	sampled outle	ets	68.9% of 4,000	sampled o	outlets	· ·	sampled outlet	s					
Activity Index 2/	Activity Index = 8,180			•	ndex = 6,99		Activity Index = 4,680			Activity Index = 2,190				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg			
SERVICE DELI - Turkey	(φ/ροατία)	Stores Wid	i Avg	(φ/ρομπα)	Sidles	rviu Avg	(φ/ροαπα)	Stores Wid F	wy	(φ/ροαπα)	Sidles v	viu Avg		
Category 1														
Processor Brand	5.99 - 11.99	920	7.04	6.99 - 10.49	180	8.22	6.99 - 9.99	90 8	.16	7.49	30	7.49		
Private Brand	6.79 - 8.49		6.99	6.99 - 7.99	300	7.14								
Category 2														
Processor Brand	4.48 - 6.99	1,320	5.87	4.97 - 5.99	1,150	5.49	4.99 - 7.99	520 6	.06	4.99 - 5.99	260	5.93		
Private Brand	4.98 - 7.99	690	6.64	5.99 - 7.49	730	6.90	6.99 - 7.49	660 7	.02	7.49	210	7.49		
Category 3														
Processor Brand	2.99 - 4.99	180	3.47	3.99	10	3.99				3.99	10	3.99		
Private Brand	2.99 - 5.99	100	5.38	2.99 - 5.99	420	5.59	5.99	550 5	.99	5.49 - 5.99	320	5.51		
Turkey Ham														
Processor Brand	3.49	10	3.49	1.99 - 2.49	140	2.05	2.59 - 2.69	70 2	.65					
Private Brand														
Turkey Pastrami														
Processor Brand	3.49	10	3.49											
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	5.95 - 7.99	620	6.64	5.79 - 6.99	500	5.99	7.49	30 7	.49	8.49 - 12.99	20	11.02		
Private Brand	5.99 - 9.99	180	7.62	6.99 - 7.99	500	7.46	6.99 - 7.49	420 7	.04	7.49	20	7.49		
Category 2														
Processor Brand	3.98 - 6.98	40	5.38											
Private Brand	5.98 - 5.99	330	5.98											
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	2.50 - 3.99	1,610	3.02	1.98 - 2.98	1,440	3.24	2.75 - 3.99		.69	2.50 - 3.99	590	3.69		
Private Brand	3.00	120	3.00	3.00	90	3.00	2.99	380 2	.99	3.00	70	3.00		
Turkey 16 oz														
Processor Brand					70	4.99								
Private Brand	4.99	160	4.99											
Chicken 7-10 oz														
Processor Brand	2.50 - 3.99		3.04	1.98 - 2.99	1,370	3.26	2.75 - 3.99		.69	2.50 - 3.99	590	3.69		
Private Brand	3.00	120	3.00	3.00	90	3.00	2.99	380 2	.99	3.00	70	3.00		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)